

Marketing: School Year _____
Financial Services Marketing
Course Code # 5006 Term: ____ Fall ____ Spring
 ½ Credit _____ 1 Credit _____ 2-3 Credits _____

Standards to be completed for ½ credit are identified with one asterisk(*).
 Additional standards to be completed for 1 credit are identified with two asterisks (**). A work-based learning component for 2-3 credits is identified by three asterisks (***).

Student:	Grade:
Teacher:	School:
# of Competencies in Course: ½ credit = 28, with Work-Based Learning = 30, 1 credit = 42, WWBL = 44	
# of Competencies Mastered:	
% of Competencies Mastered:	

***Standard 1.0 The student will recognize the types and functions of financial institutions and credit options available.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
1.1	Examine the different types of financial institutions and their functions			
1.2	Evaluate career opportunities available in the financial services industry			

****Standard 2.0 The student will examine the marketing strategies utilized by financial institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
2.1	Analyze the marketing concept as it relates to financial institutions			
2.2	Identify markets segments			
2.3	Analyze marketing mix as it relates to financial institutions			
2.4	Appraise the impact of competition among financial institutions			

***Standard 3.0 The student will gain an understanding of economic concepts and principles in a global economy.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
3.1	Differentiate between the types of economic systems including the interrelationship of business, government and individuals			
3.2	Assess economic concepts globally			
3.3	Analyze the free enterprise system			
3.4	Examine economic indicators and business cycles			
3.5	Demonstrate a knowledge of international trade			
3.6	Evaluate the relationship of cost/profit to supply and demand			
3.7	Evaluate the effects of monetary and fiscal policies on economic decisions			
3.8	Examine the relationship of values/beliefs to economic goals			

***Standard 4.0 The student will interpret checking, savings, and investment options offered through various financial institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
4.1	Examine the procedures for cashing and issuing checks in a financial institution			
4.2	Investigate the procedures for handling various types of deposits			
4.3	Analyze investment options such as savings accounts, individual retirement accounts, money market accounts, stocks, bonds, etc.			

****Standard 5.0 The student will analyze the variety of sources and types of credit available, including legal aspects of credit and collection procedures.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
5.1	Compare and contrast institutions that provide credit and the types of credit provided			
5.2	Examine the characteristics and requirements for obtaining various types of credit			
5.3	Evaluate the importance of credit monitoring institutions			
5.4	Assess the legal aspects of credit			

****Standard 6.0 The student will examine sources and types of capital funding.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
6.1	Analyze the requirements considered in granting credit			
6.2	Evaluate credit options			
6.3	Analyze the sources and types of capital			
6.4	Examine a financial plan			

****Standard 7.0 The student will analyze existing technology as it relates to financial services marketing.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
7.1	Examine technological applications in financial services			
7.2	Explore computer technology and electronic equipment in offering financial services			

***Standard 8.0 The student will apply organizational and leadership skills.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
8.1	Examine the purpose and principles of DECA			
8.2	Develop leadership skills through class-related regional, state and national activities of DECA			

*****Standard 9.0 The student will analyze how financial services marketing principles are applied in a specific work-based learning experience.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
9.1	Demonstrate interview, application and writing skills necessary for job attainment			
9.2	Compare career options in financial services marketing and the required education and training			

***Standard 10.0 The student will apply and relate subject matter to financial services marketing.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
10.1	Utilize proper grammar and writing skills			
10.2	Utilize effective communication skills			
10.3	Assess the value of art and design in financial services			
10.4	Demonstrate an understanding of the properties of real numbers			
10.5	Apply algebraic procedures to solve equations and interpret results			
10.6	Interpret real data			
10.7	Demonstrate competency of rates and other direct and indirect measurements			
10.8	Examine environmental issues in financial services operations			
10.9	Assess the impact of historical events on the financial services industry			
10.10	Explore psychological and sociological patterns of individuals			
10.11	Analyze characteristics of a population			
10.12	Examine legal and ethical issues affecting financial services institutions			
10.13	Evaluate economic principles as they apply to the financial services industry			

Additional comments:
